

BRIEFLY

Support for black dance

The American Dance Festival in Durham received \$486,900 from the Lila Wallace-Readers Digest Fund to develop and expand audiences for its Black Tradition in American Modern Dance on Tour project.

Day school creates endowment

The Greensboro Day School received \$50,000 from the Edward E. Ford Foundation of Providence, R.I. to create an endowment for minority teaching internships and minority teacher development.

Latin dance in Raleigh

A performance by the Columbian National Dance Ensemble for the Latin American Resource Center's Community / Schools Residency Program will be held at 2 p.m. Oct. 8 at the NC Museum of Art, Raleigh.

Massage center offers prizes

The Carolina Therapeutic Massage Center in Raleigh is offering a prize of eight massages for the top money raisers in the Oct. 10 Thad Eure Jr. Walk for Hope. The walk begins at 9 a.m. at the Angus Barn and will benefit the Foundation for Hope.

Drug action launches campaign

Drug Action, a Raleigh non-profit helping substance abusers, has launched its annual fundraising drive. The campaign will include mailings to residents and businesses. For information on the organization's programs, call 832-4453.

Chef's auction in Triangle

Some of the Triangle's leading chefs and caterers will take part in a culinary auction Oct. 7 to benefit the March of Dimes Birth Defects Foundation. The event, at the North Raleigh Hilton, will feature food samples. For information, call 781-2481.

Looking long-term

Religious organizations plan ahead with new forms of giving

Religious organizations in North Carolina are working with their congregations to develop long-term financial plans, including the creation of endowments and planned-giving strategies such as wills, trusts and insurance policies. Administrators of existing endowments say funds are being used more often for social-service programs than for brick-and-mortar types of projects.

BY BARBARA SOLOW

Douglas Byrd is trying to change the way church members look at giving. As executive director of the United Methodist Foundation Inc., he is responsible for helping churches and their members develop better financial planning. Established in 1955, the foundation manages about 260 endowment

and investment accounts for Methodist churches throughout North Carolina. The funds range in size from a few thousand to several hundred thousand dollars.

Through workshops and meetings at individual churches, Byrd tries to encourage congregants to look at giving over the long-term.

"We try to open up an understanding of what Christian stewardship is all about," he says. "It's not just, I'm going to give X percent of my income to the church. But it's that everything I have is a trust from God and I'm responsible for all of it. I should think about the total of what I have, not just my paycheck."

Faced with uncertain economic times and changing demographics, many Tar Heel religious congregations are turning to new strategies to achieve long-term financial stability.

Among the most popular are estate planning and endowment-building.

A new study by the nonprofit

RELIGION

research and advocacy group, Independent Sector, showed a majority of U.S. religious congregations did not expect much change in individual giving.

The study, "From Belief to Commitment," showed more than one-third expected an increase of less than five percent in giving through pledges, and nearly one-fourth expected pledge-giving to remain flat. The study involved 727 religious congregations across the country.

The North Carolina Baptist Foundation is thought to be the oldest religious foundation in the nation. Chartered in 1920, it manages approximately 960 endowment funds representing more than \$43 million.

"We're unique in Baptist life in that a person who chooses to use the foundation can use one instrument to direct their income to one or more of

several institutions or mission causes," says Executive Director Edwin Coates.

About \$16 million of the \$43 million managed by the foundation is involved in deferred-giving funds that generate income that eventually will be used for charitable purposes.

"There are so many creative ways that people can make

gifts and not really take away from their family and their heirs," Coates says. "Most of the funds we have

received in recent years have been through deferred-type vehicles."

Faced with a growing number of parishioners, the Catholic Diocese of Raleigh is looking at ways to fund future vocations to the priesthood.

The Diocese, which grew by about 6 percent last year to 35,000 households, has just begun a planned giving program to make parishioners aware of how they can give to the church through wills, trusts and life insurance policies.

The program will be publicized through workshops, weekly advertisements in the Diocesan newspaper and mailings to member households, says James Mulvey, director of development for the Diocese.

"We know through demographic studies that there will be a tremendous transfer of wealth and assets from aging baby-boomer parents over the next several years," he says. "This is an opportunity to remind people that they can remember the church as they are doing estate planning."

Since it began a similar program in 1990, the Catholic Diocese of Charlotte has raised \$13 million in commitments through wills, trusts and estate planning.

Development Director Jim Kelley says the Diocese is talking about establishing a foundation that would raise money for elderly housing, scholarships, parish maintenance and other church-related needs.

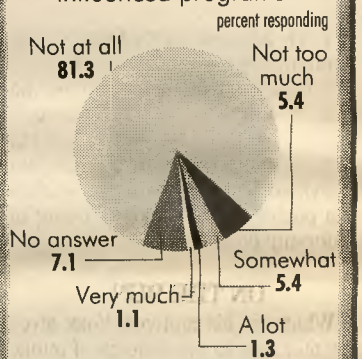
"My hope is that after about 10 to 15 years, we'll have 40 or 50 separate endowments set up," he says. "We don't find our giving has flattened. It's more that there is still a lot of potential out there that's untapped."

Endowment-building also is a priority for the Jewish Federation of Greater Charlotte, which acts as a giving system for local social-service agencies such as the Jewish Community Center and the Blumenthal Home for the Aged.

"In the last seven years, we have built a Jewish Community Center, built a \$6 million building for Temple Israel and an approximately \$4 million building for Temple Beth El," says Alan Kronovet, campaign asso-

How giving affects programs

A survey of 727 religious congregations reported the extent to which availability of funds influenced programs



Source: Independent Sector
Philanthropy Journal of North Carolina

ciate for the federation. "Now that the infrastructure of our community is built, the next thing is perpetual care."

Not every congregation is in a position to establish long-term funds.

Henry Unger, head of the congregation at Temple Beth Or in Raleigh says it "would be lovely to set up an endowment. But it's a question of not being blessed with any big hitters. Endowments traditionally have gotten started with large initial funding by someone. We don't really have any big industrialists in Raleigh."

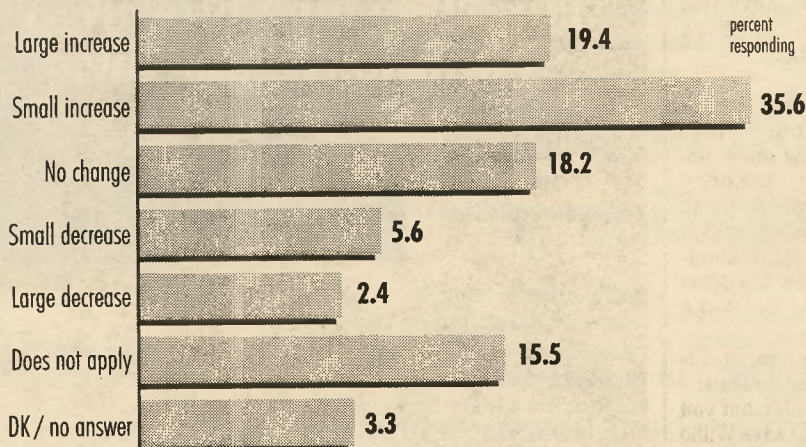
Coates of the Southern Baptist foundation advises congregations to start small.

"So that every member of the church can feel part of this, we've permitted individuals to start funds and grow them to where they would not be paying out any income [to the church] until they reach \$5,000," he says.

"We feel an obligation to the individual who would like to be a philanthropist but really could not consider themselves as such."

Religious Giving

A survey of 727 religious congregations nationwide showed most expected only small increases in individual pledges compared to the previous year.



Source: Independent Sector

Philanthropy Journal of North Carolina



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BOONE

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ter is 95 miles away in Asheville. There also are chapters in the Triad, Triangle, Charlotte and Wilmington.

"We're kind of isolated up here," Moretz says, "But we have enough folks to be able to have a chapter."

The idea for the chapter grew out of a meeting of fundraising executives. They were gathered to discuss computer software but spent a lot of time lamenting how far they had to drive to NSFRE meetings.

Moretz decided to look into forming a chapter. With the help of Tom Lawson, director of development at

Appalachian State University in Boone, the two determined how much interest there was for a chapter, and how to go about forming one.

The group is now 19 members strong. Moretz says he thinks the chapter will grow to about 25 members.

"That will be small, but large enough to attract speakers to come in. We can get seasoned veterans to come in and work with us."

Membership at other chapters includes Charlotte, 99; the Triad, 90; the Triangle, 52; Asheville, 36; and Cape Fear (Wilmington), 15.

Most of the fundraisers in Boone - including Moretz - are relatively new to the profession, which makes a

NSFRE chapter even more important.

Moretz is just completing his first million-dollar-plus campaign to replenish the 129-bed hospital's reserve funds for construction of a cancer treatment facility.

The facility opened in January 1993.

Having a NSFRE chapter in Boone "will give the fundraising business an opportunity to get together and to network on an organizational basis," Moretz says.

"It will provide an opportunity to bring educational programs to fundraisers. Anything we can do to further our education in the field is very appreciate and very valuable."